

Michigan Treasury Online (MTO) Optimization

Learning Series 3: Selecting a User Role

NOTE: These documents are for demonstration purposes only and are not actual accounts or taxpayers.

January 2016

Customer Friendly







Simplified Process

What's New in MTO?

- How to Select a User Role

Learning Series 3: Selecting a User Role (Access Type)

Before continuing, please spend a few minutes becoming familiar with the images used in this Learning Series:

Image	Purpose
	To indicate a change in process or functionally that is expected to significantly increase the user experience
	To indicate a reminder or a relevant note within a text
	To indicate a quick tip or faster way of completing an action
	To number steps on screenshots
	To highlight any part of the screenshot, such as a button
	To draw attention to a relevant section of information/text (not a button)

Old Process	New Process (Effective January 2016)
<ul style="list-style-type: none"> Only the business owner can enter into MBOS and give/delegate account access to a 3rd party user (such as a CPA, an Association member, etc.) As part of the delegation process, the user seeking access will wait up to several days to receive a PIN in the mail 	<ul style="list-style-type: none"> A 3rd party user (<i>with the business' permission</i>) can establish a relationship or (self-delegate) to a business The delegation process requires less steps due to enhanced shared secret authentication and elimination of sending the one-time access code via paper mail

There is a simplified process for establishing a relationship to a business. ***The first time a user established their first relationship to a business, the user is emailed a one-time access code.*** Going forward, that user will not have to enter an access code if and when establishing a relationship to another business. Anytime a user establishes a relationship to a business, a **User Role** must be selected. See [Learning Series 2](#) for more information on established a relationship to a business.

User Roles:

Manage Business Account Information – full manage rights that includes Registration functions and File and Pay SUW return functions. This role allows a user to add and update registration information along with the ability to file, pay, amend, view and previously filed returns.

File and Pay Sales, Use and Withholding Taxes Only – this role allows a user to file, pay, amend print and view current and previously filed SUW tax returns.

Fast File Now – a business relationship is not established therefore shared secret questions are not answered and an access code is not received when a user selects to user Fast File Now.

This is a guest access where not business relationship is established. With Fast File Now, there are limited capabilities; the user is restricted to simply filing and paying a Sales, Use and Withholding tax return. The user is not able to amend, view or print returns.

When establishing a relationship to a business, a user has two roles from which to chose.

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Michigan Treasury Online

Verify Business Relationship

Fill in all of the information below to verify a business relationship.

Progress: 1 Business Details, 2 Filing Information, 3 Verify Business, 4 Enter Access Code

Filing Information

* Required

* What tasks will you perform for the business?

- ☐ Manage Business Account Information
- ☐ File and Pay Sales, Use and Withholding Taxes Only

Buttons: NEXT, BACK, CANCEL

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Selecting a User Role When Establishing a Business Relationship:

User Roles have a direct connection to a business relationship and influence the transactions the user can perform for the business. For example, if a user has 5 different businesses added to his/her profile (meaning they have established a relationship with each business), the user may have a different user role for each business.

1. Select the **CREATE A NEW BUSINESS RELATIONSHIP** business card on the MTO home page.

The screenshot shows the Michigan Treasury Online Home page. At the top, there is a navigation bar with the Michigan.gov logo, a home icon, and links for HELP CENTER, CONTACT US, and a user profile dropdown (SUZANNE BLU). Below the navigation bar is a teal header with the text "Michigan Treasury Online". The main content area has a sub-header "Michigan Treasury Online Home" followed by a paragraph explaining the purpose of the page. Below this is a section titled "Your Businesses" with a search bar and a "FAST FILE NOW" button. A red arrow labeled "1" points to a button with a plus icon and the text "CREATE A NEW BUSINESS RELATIONSHIP". At the bottom of the page is a footer with the Michigan.gov logo, links for MTO HOME, CONTACT US, and POLICIES, and a copyright notice for 2016 State of Michigan.

2. Enter the **FEIN** or **Treasury Number** of the business.
3. Select the **Next** button.

The screenshot shows the Michigan Treasury Online "Verify Business Relationship" page. At the top, there is a navigation bar with the Michigan.gov logo, a home icon, and links for HELP CENTER, CONTACT US, and a user profile dropdown (SUZANNE BLU). Below the navigation bar is a teal header with the text "Michigan Treasury Online". The main content area has a sub-header "Verify Business Relationship" followed by a paragraph explaining the purpose of the page. Below this is a section titled "Basic Business Details" with a list of required fields. A red arrow labeled "2" points to the "FEIN or Treasury Number (TR)" input field, which contains the value "21-02154". Below the input field is a link that says "I don't have an FEIN". At the bottom of the page, there are two buttons: "NEXT" and "CANCEL". A red arrow labeled "3" points to the "NEXT" button.

4. Select the **User Role** based on the transactions you want to perform for the business. If Manage Business Account Information is selected, the user will have full access rights.
5. Select the **Next** button.

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Michigan Treasury Online

Verify Business Relationship

Fill in all of the information below to verify a business relationship.

1 Business Details 2 Filing Information 3 Verify Business 4 Enter Access Code

Filing Information

* Required

* What tasks will you perform for the business?

☒ Manage Business Account Information

☐ File and Pay Sales, Use and Withholding Taxes Only

4

5 NEXT BACK CANCEL

6. Answer the **Security Questions**.

Michigan.gov

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Michigan Treasury Online

Manage Business Verification

Fill in all of the information below in order to be set up to manage this business.

1 Business Details 2 Filing Information 3 Verify Business

Security Questions

Answer all of the following questions.

* Required

6

Security Questions will be displayed below

Note: For security purposes, Verification Questions will not be shown in the Learning Series

7. Once the security questions have been answered, select **Verify**.

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Michigan Treasury Online

Manage Business Verification

Fill in all of the information below in order to be set up to manage this business.


1 Business Details 2 Filing Information 3 Verify Business

Security Questions

Answer all of the following questions.

* Required

VERIFY BACK CANCEL

 **Note:** *If your answers are invalid, you will be given this warning message before being locked out of the system for 60 minutes.*

Invalid Response

The answers you provided are not associated with the selected business. Your access to this FEIN has been restricted for 60 minutes.

CLOSE

- If all questions are answered correctly, you will see the new business listed on a business card on your MTO home page. The user's access rights (**Manage Business Account Information, for example**) is displayed on the business card.



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SUZANNE BLU ▾

Michigan Treasury Online



Michigan Treasury Online Home

Select a business card to perform transactions on behalf of the selected business. To establish access rights to a business not listed, select "Create a New Business Relationship". If you would like to file now without creating a business relationship, click the "Fast File Now" button.

Your Businesses

Q Enter a name to search

FAST FILE NOW



CREATE A NEW BUSINESS
RELATIONSHIP

BOB'S BUILDINGS

FEIN
2101554

Access Rights
Manage Business

Edit

Remove

8

Edit a User Role for an existing business relationship:

- Select **Edit** on the business card of the associated business



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Michigan Treasury Online



Michigan Treasury Online Home

Select a business card to perform transactions on behalf of the selected business. To establish access rights to a business not listed, select "Create a New Business Relationship". If you would like to file now without creating a business relationship, click the "Fast File Now" button.

Your Businesses

Q Enter a name to search

FAST FILE NOW



CREATE A NEW BUSINESS
RELATIONSHIP

BOB'S BUILDINGS


FEIN
2101554

Access Rights
Manage Business

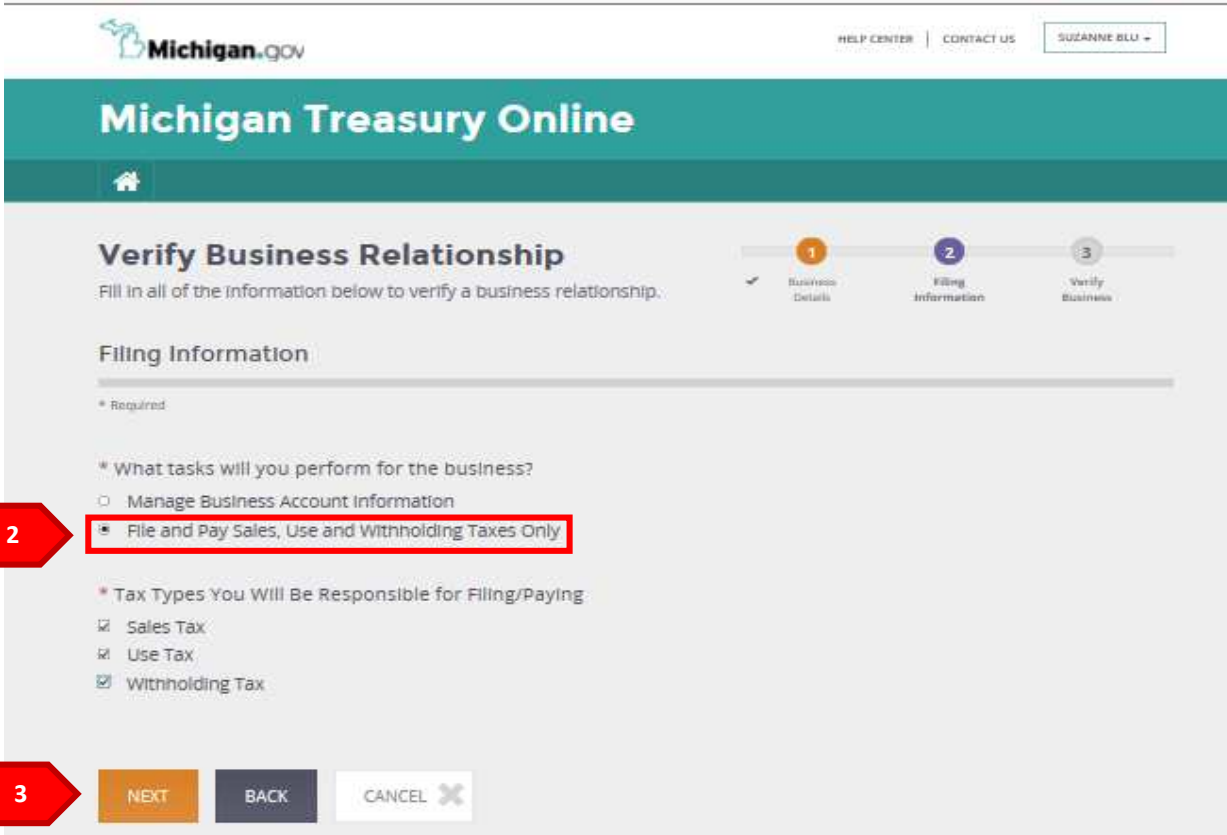
Edit

Remove

1

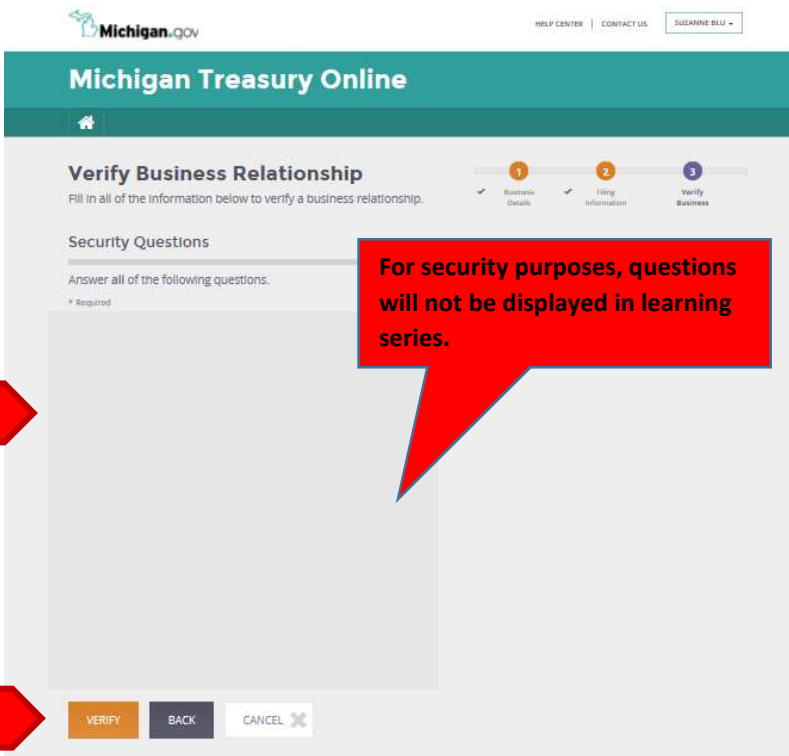
 **Note:** The user currently has “Manage Business” as the user role. Selecting “Edit” allows the user to change his/her role.

2. Select the desired user role and the taxes that will be filed (if the user role selected is File and Pay). In this example, the user wants **File and Pay – Sales Tax**.
3. Select the **Next** button.




The screenshot shows the 'Michigan Treasury Online' interface. At the top, there's a navigation bar with 'Michigan.gov', 'HELP CENTER', 'CONTACT US', and a user profile 'SUZANNE BLU'. Below this is a teal header with 'Michigan Treasury Online' and a home icon. The main section is titled 'Verify Business Relationship' with a subtext 'Fill in all of the information below to verify a business relationship.' A progress bar at the top right shows three steps: 1. Business Details (completed), 2. Filing Information (current), and 3. Verify Business. Under 'Filing Information', there's a section '* Required' with a question '* What tasks will you perform for the business?'. Two radio button options are listed: 'Manage Business Account Information' and 'File and Pay Sales, Use and Withholding Taxes Only'. The second option is selected and highlighted with a red box. Below this, another '* Required' section asks '* Tax Types You Will Be Responsible for Filing/Paying.' with three checked checkboxes: 'Sales Tax', 'Use Tax', and 'Withholding Tax'. At the bottom, there are three buttons: 'NEXT' (highlighted with a red arrow labeled '3'), 'BACK', and 'CANCEL'.

4. Answer the **Security Questions**.
5. Select the **Verify** button.



The screenshot shows the 'Michigan Treasury Online' interface, now at Step 3: Verify Business. The progress bar at the top right shows three steps: 1. Business Details (completed), 2. Filing Information (completed), and 3. Verify Business (current). The main section is titled 'Verify Business Relationship' with a subtext 'Fill in all of the information below to verify a business relationship.' Below this is a section titled 'Security Questions' with a subtext 'Answer all of the following questions.' and a '* Required' label. The content area for the security questions is mostly blank, with a red arrow labeled '4' pointing to it. At the bottom, there are three buttons: 'VERIFY' (highlighted with a red arrow labeled '5'), 'BACK', and 'CANCEL'. A red speech bubble with white text is overlaid on the right side of the page, stating: 'For security purposes, questions will not be displayed in learning series.'


6. The business card of the business will display the updated user role.



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Michigan Treasury Online




Michigan Treasury Online Home

Select a business card to perform transactions on behalf of the selected business. To establish access rights to a business not listed, select "Create a New Business Relationship". If you would like to file now without creating a business relationship, click the "Fast File Now" button.

Your Businesses

Enter a name to search

FAST FILE NOW




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BOB'S BUILDINGS


FEIN
2101554

Access Rights
File and Pay

 Edit

Remove





 **Note:** The user now has “File and Pay” as their user role.



Contact Us

If you have additional questions that were not answered using this Learning Series, please call the Michigan Department of Treasury at 517-636-6925.

The MTO Business website is currently being revised to include updated information on MTO and the changes to SUW that will begin in January. The website can be accessed here: www.michigan.gov/mtobusiness.